



Title: I, Payroll/Personnel Manual

Chapter:

Bulletin: 09–4, Processing of Union/Association Deductions for Members of the Senior Executives Association (SEA)

Date: March 18, 2009

To: Holders of the Payroll/Personnel Manual

This bulletin provides guidance for the proper processing of union/association transactions to establish payroll deductions for individuals who authorize withholdings for the Senior Executives Association (SEA). Eligible employees may authorize payments of dues to this professional association through payroll deductions. A review of our system has revealed that some SEA member deductions have been established incorrectly as financial allotments or discretionary allotments instead of as union/association dues, which is the correct method. Instructions for processing SEA dues correctly as union/association dues are provided below:

Form SF–1187, Request for Payroll Deduction for Labor Organization Dues, or other appropriate form must be completed by the employee and the union/association to authorize dues deductions when:

- The employee is a supervisor or management official and is a member of a supervisory or managerial association, and the agency has agreed in writing with the association to deduct for payment of fees to maintain membership.
- The employee is a member of a professional association or organization, and the agency has agreed in writing with the association or organization to deduct for payment of dues.

Once this information is obtained from the employee, it is the agency’s responsibility to enter the union/association document, “Authorization of Labor Organization Dues” into NFC’s Entry, Processing, Inquiry and Correction system (EPIC), *EmpowHR* system, or the agency’s Front–End System Interface (FESI). Instructions for entry of this document into EPIC and *EmpowHR* are [attached](#).

The agency must verify that the Bargaining Unit Status (BUS) Code for the employee in the Position Management System Online (PMSO) is Code 7777 or 8888 for members of the SEA. An employee with BUS Code 7777 or 8888 is not entitled to dues withholding for labor organization dues but is entitled to dues withholding for a professional association and other organizations.

The Table Management System (TMGT) lists all the valid union, association and organization codes, and addresses for dues deductions. Also included on the table are the dues withholding amounts or percentages for calculating dues, to avoid any over/underpayment to a local or chapter. The agency should access TMGT Table 010 to verify that the organization and the applicable rates exist in the Payroll/Personnel System (PPS). The agency should also access the applicable Information Research/Inquiry System (IRIS) programs to ensure that for new authorizations, the allotment data being entered is not currently on the database. Each pay period, the National Finance Center (NFC) disburses one payment to each association for all employees that have a union/association record established in the PPS for the respective local. The payment is followed by a report for reconciliation which is sent to the address listed on TMGT Table 010. Any deduction that is established incorrectly using the regular Financial Allotment or Discretionary Allotment process is sent individually and is not included in the disbursement or on the above referenced report, which causes discrepancies in the association's reconciliation process.

Once the union/association dues record is established, the following IRIS programs can be accessed to view union/association data:

- IR308, Union/Association Dues
- IR309, Union/Association Dues Transactions
- IR311, History Union/Association Dues

For reference, the EPIC and *EmpowHR* procedures are available online at the NFC Web site. To view and/or print these procedures, go to NFC's Home Page (www.nfc.usda.gov) and click the **Publications** link at the top of the page. At the Publications page right-hand Quick Picks menu, click **Procedures by Acronym** or **Procedures by Title/Chapter** then search for Title I, Chapter 23, Entry, Processing, Inquiry, and Correction System, or Title I, Chapter 17, *EmpowHR*, on the list provided.

For questions about policy/regulations, contact your Agriculture Payroll/Personnel User Group (AGPUG) representative or Committee for Agriculture Payroll/Personnel System (CAPPS) representative. Please refer questions about processing payroll documents through EPIC or *EmpowHR* to the Payroll/Personnel Call Center at **504-255-4630**.

 for

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Attachment

Steps For Entering Union (Organization) Dues In EPIC

To enter union/organization dues or a parking fee document in EPIC:

1. At the EPIC Navigation window, select **Payroll Document** at the New Documents menu. An alphabetic list appears.
2. Select **Union Dues > [applicable dues transaction]**.
3. At the menu bar, select **Edit > Add New Document**. The applicable window is displayed.

The screenshot shows the 'EI3501 - Authorization of Labor Organization Dues' window. It features a menu bar with 'File', 'Edit', 'View', 'Window', and 'Help'. Below the menu bar is a toolbar with icons for adding, saving, printing, and help. The main form area contains several input fields: 'Dept/Agcy', 'POI', 'SSN', 'Effective Pay Period', 'Pay Period Year', 'Request #', 'Name Last', 'First', 'Middle', 'Organization Code' (with 'Union' and 'Local' sub-fields), 'Deduction Amount or Deduction Percent', 'Prior Pay Period Adjustment Code', 'New Local or Lodge Code', 'Employee Authorization Date', and 'Status Code'. At the bottom of the window, there are three buttons: '02-08-2001', '13:24:54', and 'NEW'.

Figure 1a. Union Dues window (authorization, change, cancellation, revocation, or mass change)

4. Complete the fields as indicated under [Union Dues Window Field Instructions](#).
5. After completing the fields, select **File > Save**. The Save Changes pop-up appears.
6. Click **[Yes]** to save the entries and exit the action.
OR
Click **[No]** to exit the window and not save the entries.
OR
Click **[Cancel]** to reopen the window.

EPIC Union Dues Window Field Instructions

The Organization Dues window (**Figure 1a**) is used to enter organization dues data. For instructions on the entry process, see [Steps For Entering Union \(Organization\) Dues](#).

Organization Code	The union/association and local codes.
Union	Type the union/association code to be established, changed, or canceled/revoked in the database. Verify the union/association code by accessing IRIS Program IR308.
Local	Type the local code to be established, changed, or canceled/revoked in the database.
Cancellation/Revocation	<p>Click the applicable radio button to indicate a cancellation or revocation. The system default is cancellation.</p> <p>For cancellations, deductions are withheld for the effective pay period entered and stop the following pay period.</p> <p>For revocations, the union/association has an established revocation-eff-code in TMGT; the dues stop the pay period of the authorized revocation date as established in TMGT, Table 010.</p>
Deduction Amount	Type the amount to be deducted each pay period for membership dues in dollars and cents if the deduction is based on a specific amount. No entry is necessary if the deduction amount is established in TMGT.
OR	
Deduction Percent	<p>Type the percent to be deducted each pay period for membership dues in whole numbers and two decimal places if the deduction is based on a percentage. No entry is necessary if the percent amount is established in TMGT.</p> <p>Note: Do not enter both a deduction amount and a deduction percent.</p>
Prior Pay Period Adjustment	Type 9 if deductions were made in error or if cancellation notification was received after the revocation date; otherwise, leave blank.
New Local or Lodge Code	Type the code for the new local or lodge for the transfer.
Employee Authorization Date	Type the date the employee authorized the membership dues deduction.

Steps For Entering Union (Organization) Dues In *EmpowHR*

To enter union/organization dues in *EmpowHR*:

1. On the *EmpowHR* main window, select the **Payroll Documents** menu group.
2. Click the **Union Dues** component. The Find An Existing Value tab - Union Dues page allows the user to locate an existing employee in order to enter or change union dues. Enter the search criteria.
3. Click **Search**. The Union Dues Page (**Figure 1b**) is displayed.

Mullendore, Linda A EmplID: 033104 Rcd# 0

Union Dues Find | View All First 1 of 1 Last

*Effective Date: 06/22/2008 Pay Period: 13 Date Entered: 07/01/2008

User ID: CAMSBD Transaction Status: InProgress

Contribution Data

Dues Type:

*Union Code:

*Local:

Deduction Limit Amount:

or

Deduction Limit Percent:

Union Transaction Code:

Figure 1b. Union Dues page

4. Complete the fields as indicated under [EmpowHR Union Dues Page Field Instructions](#).
5. Click **Save** to save the transaction.
6. Click **OK** on the pop-up. At this point the following options are available:

Step	Description
Click Return To Search	To enter an additional transaction.
Click Notify	To send an email to the next individual in the workflow.

***EmpowHR* Union Dues Page Field Instructions**

The *EmpowHR* Union Dues page (**Figure 1b**) is used to enter organization dues data. For instructions on the entry process, see [Steps For Entering Union \(Organization Dues\) In *EmpowHR*](#).

Name	This field is populated from the search criteria. The name of the employee is displayed from the EmplID entered.
EmplID	This field is populated from the search criteria entered.
Rcd#	This field is the number of records for that employee.
*Effective Date	This is the date on which a table row becomes effective; the date that an action begins. This date also determines when to view or change information. This field is populated with the beginning date of the current pay period. Select a date from the calendar icon to change the default date.
Pay Period	This field is populated and cannot be changed.
Date Entered	This field is populated and cannot be changed.
User ID	This field is populated with the system identifier for the individual who generates the transaction. The name is also displayed.
Transaction Status	This field defaults to In Progress and cannot be modified.
Dues Type	Select the applicable dues type from the drop-down list. The valid values are as follows:

Dues Type Valid Values	Description
083	Dues Change
084	Change Between Locals
085	Cancel
086	Enrollment

***Union Code** Enter the union/association code to be established, changed, or canceled/revoked in the database. Verify the union/association code by accessing IRIS Program IR308.

***Local** Enter the local code to be established, changed, or canceled/revoked in the database.

Deduction Limit Amount Enter the amount to be deducted each pay period for membership dues in dollars and cents if the deduction is based on a specific amount. No entry is necessary if the deduction amount is established in TMGT.

OR

Deduction Limit Percent Enter the percent to be deducted each pay period for membership dues in whole numbers and two decimal places if the deduction is based on a percentage. No entry is necessary if the percent amount is established in TMGT.

Note: Do not enter both a deduction amount and a deduction percent.

Union Transaction Code Enter the applicable code.

* Field names that are preceded with an asterisk (*) are required fields. The user must enter data in these fields before proceeding.